



Brokaw Credit Union

Switch Kit Checklist

Transfer your account to Brokaw Credit Union by using this simple switch kit.
Just print this checklist and check off the boxes on your printed copy as you complete the items.

<p>Open your membership and checking account at Brokaw Credit Union. You may initiate this by visiting our office or by completing the online <i>Membership Application</i>.</p>
<p>Make certain funds are available in your old account to cover any automatic payments, checks, and check card transactions that may still be withdrawn. Check maturity dates on Certificates of Deposit if transferring in order to avoid early withdrawal penalties.</p>
<p><i>Direct Deposit Change Request Form</i> Send written notices to companies with which you have direct deposit (employer, government deposits, pension, transfers from other financial institutions, investment dividends, child support or court-issued deposits, etc) notifying them that you want to switch your direct deposits to your new Brokaw Credit Union account.</p>
<p><i>Direct Deposit / Payroll Deduction Allocation Form</i> Send notifications to BCU of the deductions you would like applied to your direct deposit.</p>
<p><i>Direct Deposit Employer Information</i> Send written notice to set up new direct deposits with any payroll companies. To change Social Security deposits, visit: www.ssa.gov/deposit/howtosign.htm Or call the Social Security Administration: 1-800-772-1213 (TTY 1-800-325-0778) Brokaw Credit Union Routing/Transit number: 275977159</p>
<p><i>Request to Cancel Automatic Payments Form</i> Send written notices to companies that automatically take payments from your checking account (utilities, mortgage, insurance, brokerage, credit cards, internet service providers, transfers to banks, child support, court issued payments, etc) notifying them that you are closing the account.</p>
<p><i>Request to Change Automatic Payments Form</i> Send this form to companies notifying them that you want to transfer existing automatic payments from your previous financial institution to Brokaw Credit Union.</p>
<p>Contact companies that take payments from your old checking account using a debit card. Inform them of your new Brokaw Credit Union Debit Card number and expiration date.</p>
<p>Verify that your direct deposits and automatic payments have begun posting to your new account.</p>
<p>Verify that all checks, check card transactions, and scheduled bill payments have cleared your old checking account.</p>
<p><i>Account Closing Request Form</i> Send written notice to your old financial institution informing them you are closing your account.</p>